Field Types Explained: Configure User Profile Fields

Introduction

From the Admin side of the People application, you can create new user profile fields.

These fields can then be chosen to display in different areas of the Intranet or not, depending on your aims.

When adding a new user profile field, there are various types available that are appropriate for certain types of data collection.

This guide will run through all types available and give an example of each that can be used to aid you in choosing the appropriate field for the outcome you desire.

Please note: You can choose to apply permissions to any of these fields to enable certain users/roles/groups to see them or update them. The ideas given for each field type in this guide are just examples of how they can be used without any permission restrictions. The most appropriate purpose for each, which best suits your company, will be up to you to decide upon and implement. Permissions can be applied to any fields you deem necessary to suit your best practices with employee information.

Getting started

Head to Applications > Admin > People > Configure user profile fields

From this area (image below) you can see all the current user profile fields created in your Intranet (Green box)

You can change which of these appear in other sections of your site using the tabs on the right (Purple box)

Right now, we are going to add a whole new field, so will be clicking on the 'Add new field' button (Red Box)

Title	Key	Type	Special view permissions	Special edit permissions	Ac
ID	id	int	No	No	
Account state	intranetuser	varchar	No	No	
Username	username	varchar	No	No	
Password hash	password	varchar	No	No	
First name	firstname	varchar	No	No	
Surname	surname	varchar	No	No	
User code	user_code	varchar	No	No	
Company	company	varchar	No	No	
Job Title	job_title	varchar	No	No	
Email	emailad	varchar	No	No	
Notification method	notification_method	int	No	No	
Extranet area	ex_area_id	int	No	No	
Theme	skin	varchar	No	No	
Language	language	varchar	No	No	

Field Types

From the 'add new field' screen, the type dropdown lists all fields available in Claromentis.

Depending on the type that is selected different options will be given in the 'show as' field.

This denotes how the field will appear to the user when being filled in.

Optional aspects to consider if appropriate for your field:

Default Value - The information entered here will appear in your field on the front end before a user types anything in. This can be a

helpful guide to show the user what kind of information they should be typing in.

Repeatable - Gives the option to add an extra field of the same configuration underneath the first instance on a profile. Up to 5 maximum for most field types. Helpful if you wish to add multiple hyperlinks to a profile, you can do so by repeating the field rather than creating a whole new one.

Visible even if no value - If selected, your field will appear in the areas chosen even if nothing has been typed into it.

Mandatory - A red asterisk will appear next to this field, and the user must fill it in otherwsie they cannot save their profile page. Useful for important information that every user can add to their profile.

Display this field on - You can choose any combination of Intranet areas listed that your field is going to show on by ticking the boxes.

For each field type listed in this guide, there is an accompanying image (click to enlarge)

In each visualisation, the numbers denote:

1. Configuration of the field when in 'add new field area'

2. How the field type appears to the user filing it in on their profile

3. How the field appears on the user profile from the front end

- String

Used for text based inputs and likely the most commonly used field type on user profiles.

The options for showing this on the front end are as a single line, a small text area or a medium text area.

The one you select will depend on how much information you want/require the user to type into the field.

e.g. Use the string field to allow users to enter their own address.

This likely requires more than one line of data entry so you can set this to display as a medium text field giving the user more room to enter their details.

- Long text

This field type allows text based input that is best suited to fields that desire longer passages of text as answers.

The 'show as' options here are a small, medium or large text area dependant on how long you wish users responses to be.

e.g. Use the long text field to allow users to freely write about their career details or interests.

- Integer

This field type allows numerical characters to be entered only.

The sole option for display on the front end is for a single line of text input.

e.g. Use this field type to hold each user's employee number

(You could also use a string type field to achieve this if special characters are required in the employee number and not strictly numerical values)

- Checkbox

This field type is a box that can be selected (ticked) or deselected (blank) by users in response to what the field name is asking of

them.

A ticked box will appear as a 'yes' on the front end and a deselected box as a 'no'

e.g. Use this field type to promote whether a user is available for weekend work

- Date time/Date/ Date (no year)

These three fields will all appear as date pickers on the front end, so for this field type, only images 2 & 3 will be given.

The granular configuration of each is slightly different based on what information they will require to be entered.

- Date time will ask the user to select a date, but also enter a time, e.g. when a qualification was gained (likely used in conjunction with another field above it)

- Date will ask the user to select a date, and the year will also show on the front end, e.g. use this to show a user's start date at the company

- Date (no year) offers a date to be selected, but the year will not show on the front end ever, e.g. useful to log users' birthdays but not reveal their age to other users

- Select (options)

This field type allows several answers to be entered in response to the field name prompt.

A user selects one of these, which then appears on the front end.

The 'show as' options are for answers to display in a drop-down or as radio buttons when a user is making their choice.

Regardless of the design option chosen, the answer will appear in the same format on a user's profile from the front end.

e.g. Use this field type to confirm a user's preferred contact method

- Multi-select (options)

This field type allows several answers to be entered in response to the field name prompt (as with the select field above)

However, with this field type, the user can select multiple responses to appear on the front end.

The 'show as' options are for answers to display in a list (multi-select) or as checkboxes.

Regardless of the design option chosen, the answers will appear in the same format on a user's profile from the front end.

e.g. Use this field type to confirm which locations a user is available to work at

Address	Suites 1 & 2,
	6th Floor Vantage Point,
	New England Rd,
	Brighton,
	BN1 4GW
Landline	+44 0800 409 6101
Preferred contact method	Email
LinkedIn	claromentis-ltd
Twitter	claromentis
Branch locations available to work for	London, Brighton, Crawley

3

- Reference to document

This field type offers a document picker for the user to select a file from the documents application, which appears on their profile.

This only comes in one 'show as' form, which is the picker box.

Once on a user profile from the front end, the blue 'I' when clicked will take the user to the document preview in the application and clicking the title will download the file.

Please note: if users don't have permissions to view the document, it cannot be selected, and any other user visiting the profile won't be able to download/see it without permissions either.

e.g. use this field type to attribute qualifications or certificates to a user's profile

1

Admin / People Control Panel / Configure user profile fields / Field properties

Title	First aid certificate accreditation
Key	first_aid_certificate_accreditation
	This Key is the metadata field's internal name used in searching and user import. Key should contain only letters, numbers and "_"
Type	Reference to document
Show as	Document Selector

☐ Repeatable
☐ Visible even if no value
☐ Mandatory

Display this field on
☑ "View profile" page
☑ "Edit My profile" page
☑ "Edit profile" page in admin area
☐ Main users list
☑ Users list for people admin
☑ Advanced search form

Field visibility ● Standard ○ Special ○ Advanced

No permissions, usual field visible to everyone according to configuration.

- Hyperlink

This field can only be displayed as a hyperlink, which is configured as a custom clickable title set to lead to a desired URL.

Once on a user profile from the front end, the title entered will take the user to the URL when clicked.

e.g. use this field type to allow user portfolios or published online content to be attributed to their profile for other users to engage with

Repeatable

Visible even if no value

Mandatory

Display this field on
- ☑ "View profile" page
- ☑ "Edit My profile" page
- ☑ "Edit profile" page in admin area
- ☐ Main users list
- ☐ Users list for people admin
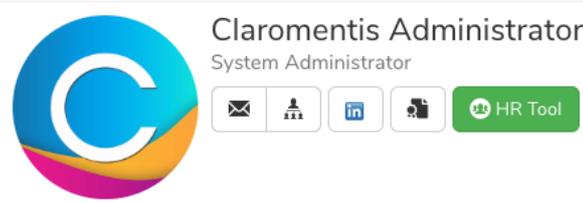- ☐ Advanced search form

Field visibility   ◉ Standard   ○ Special   ○ Advanced

No permissions, usual field visible to everyone according to configuration.

Save changes

2   **Online Portfolio**   https://myownwebsite.com

Marketing Work

People / **Profile**

Claromentis Administrator
System Administrator

✉ ⛪ in 🗂   🕐 HR Tool

👤 Profile   🤝 Thanks (0)

Address	Suites 1 & 2, 6th Floor Vantage Point, New England Rd, Brighton, BN1 4GW	**Endorsements** No endorsements yet
Landline	+44 0800 409 6101	
Preferred contact method	Email	
LinkedIn	claromentis-ltd	
Twitter	claromentis	
Branch locations available to work for	London, Brighton, Crawley	
Online Portfolio	Marketing Work 🔗 **3**	

- User Select

This field can only be displayed as a user picker, which allows another user with an Intranet profile to be selected and displayed.

The picker allows the user to type a name in and make a selection or click 'browse' to open a list and choose from it.

Once on a user profile from the front end, the user name entered becomes a link that leads to their profile.

e.g. use this field type to push an alternative contact for issues the original user cannot take on in their absence or if they cannot currently be reached.

(1)

Title   Alternative Contact

Key   alternative_contact

This Key is the metadata field's internal name used in searching and user import.
Key should contain only letters, numbers and "_"

Type   User select

Show as   User picker

☐ Repeatable
☐ Visible even if no value
☐ Mandatory

Display this field on
    ☑ "View profile" page
    ☑ "Edit My profile" page
    ☑ "Edit profile" page in admin area
    ☐ Main users list
    ☐ Users list for people admin
    ☐ Advanced search form

Field visibility   ⦿ Standard   ◯ Special   ◯ Advanced

No permissions, usual field visible to everyone according to configuration.

Add new

(2)

Alternative Contact   Select user ▲   Browse

alan

Alan
Metcalfe

People / **Profile**

Claromentis Administrator
System Administrator

✉   🏛   in   🗐   **⏱ HR Tool**

👤 Profile   🤝 Thanks **(0)**

Address   Suites 1 & 2,
6th Floor Vantage Point,
New England Rd,
Brighton,
BN1 4GW

Landline	+44 0800 409 6101
Preferred contact method	Email
LinkedIn	claromentis-ltd
Twitter	claromentis
Alternative Contact	Alan Metcalfe **3**

- Indicator (text and image)

This field type can be used to allow a user to make a selection from 5 options to demonstrate their feeling on the given metric.

Text is accompanied by an image that allows the user to make an informed selection.

e.g. Use this field type for work satisfaction or rate the relationship with a partner/client.

Within Claromentis, there are two default sets of text and images that will work to suit the two aims above, with images of smileys and stars, respectively.

The 'show as' options are as a select field or radio buttons.

Using radio buttons will ensure the image is displayed next to each option, whereas select is only text-based.

You can use the text given below to enter into the 'values' field for:

Smileys

```
Poor,/images/satisfaction/poor.png
```

```
Low,/images/satisfaction/low.png
```

```
Medium,/images/satisfaction/med.png
```

```
High,/images/satisfaction/high.png
```

```
Max,/images/satisfaction/max.png
```

Stars

```
one,/images/star/1.png
```

```
two,/images/star/2.png
```

```
three,/images/star/3.png
```

```
four,/images/star/4.png
```

```
five,/images/star/5.png
```

- File Upload

This field type can be used to allow users to attribute documents to their profile that are uploaded from their personal computer (rather than those held in the intranet's document application, like the 'reference document' field type requires)

This appears as a file upload field and a clickable link on the user profile from the front end.

The document will be downloaded when its title is clicked.

e.g. use this field type to allow users to attribute a bio they have written about themselves

Key   bio

This Key is the metadata field's internal name used in searching and user import.
Key should contain only letters, numbers and "_"

Type   File upload

Show as   File upload control

☐ Repeatable
☐ Visible even if no value
☐ Mandatory

Display this field on   ☑ "View profile" page
☑ "Edit My profile" page
☑ "Edit profile" page in admin area
☐ Main users list
☐ Users list for people admin
☐ Advanced search form

Field visibility   ● Standard   ○ Special   ○ Advanced

No permissions, usual field visible to everyone according to configuration.

2   **Bio**   About Me.docx   Upload file   Remove file

People / Profile

Claromentis Administrator
System Administrator

✉   ⛲   in   📇   🕐 HR Tool

👤 Profile   👏 Thanks (0)

Address	Suites 1 & 2, 6th Floor Vantage Point, New England Rd, Brighton, BN1 4GW
Landline	+44 0800 409 6101
Preferred contact method	Email
LinkedIn	claromentis-ltd
Twitter	claromentis
Bio	About Me.docx

Endorsements

No endorsements yet

3

- Image upload

This field type allows an image from the user's personal computer or one stored in the documents application to display on their profile.

e.g use this field to allow users to upload images of their pets, families, sports clubs they are a part of or a favourite work-related image

My furry friend

③

- Address

This field type separates each part of an address (town/city, state/county, postcode/ZIP, country) into fields, which is called the 'show as' address input format.

This is an alternative field to use for addresses specifically.

You can use a string type field to allow addresses to be entered by users, as outlined earlier in this guide.

e.g. Use this field for a user's home address (rather than using a string field) or to add business address

① Admin / People Control Panel / Configure user profile fields / Field properties

Title	Address
Key	address
	This Key is the metadata field's internal name used in searching and user import. Key should contain only letters, numbers and "_"
Type	Address
Show as	Address input
Default value	

☐ Repeatable
☐ Visible even if no value
☐ Mandatory

Display this field on
☑ "View profile" page
☑ "Edit My profile" page
☑ "Edit profile" page in admin area
☐ Main users list
☐ Users list for people admin
☐ Advanced search form

Field visibility ⦿ Standard ◯ Special ◯ Advanced
No permissions, usual field visible to everyone according to configuration.

② **Address**

Address Line 1

Address Line 2

Town/City

County/State/Province

Postcode/ZIP

Country

People / **Profile**

Claromentis Administrator
System Administrator

✉ 🔀 in 📄 🕒 HR Tool

👤 Profile   🤝 Thanks (0)

Landline	+44 0800 409 6101	
Preferred contact method	Email	
LinkedIn	claromentis-ltd	
Twitter	claromentis	
Address	123, Fake Street Brighton BN1 XXX England	**3**

Endorsements
No endorsements yet

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